

The 4-Step Deal Conversion Framework

Discovery call to signed contract — four steps, one path.

This is the conversion spine of the entire acquisition process. The discovery call finds the truth, the appointment closes the deal, and the intermission in between is where the deal is actually won.

Find the Big Why

1

Surface the real motivation — pain points AND pleasure points. Get the condition of the home, the timeline, the first asking price, and the second asking price. The seller says the pain out loud in their own words — if you name it for them, it's an accusation; if they name it, it's the truth.

"What made you start thinking about selling? And what happens if this is still sitting there six months from now?"

Set the Appointment

2

The discovery call has exactly ONE close: the appointment. You do not pitch RetailMax on this call. Six stages of questions earn the right to ask — then lock day, time, and every decision-maker in the room.

"Would Tuesday afternoon or Wednesday morning be better?"

Intermission

3

Your prep window between the call and the appointment. Underwriting runs the PQS gates against real data, pulls comps to appraisal standard, builds the net sheet and the list-price range, and preps the contract package. The Closer walks in with the math already done — never wing an appointment.

Close the Deal

4

Present the program, walk the numbers, handle what comes up, and get the PSA Package signed — all four documents at the same appointment. The net sheet does the closing: the RetailMax path has to be obviously superior for the seller in their situation.

BEFORE YOU LEAVE STEP 1 — CAPTURE ALL SIX

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| ☐ True motivation — the Big Why, in their words | ☐ Property condition — room by room |
| ☐ Pain points — what they're running from | ☐ Timeline — and the reason behind it |
| ☐ Pleasure points — what they're running toward | ☐ Both prices — what they want AND what they'll take |

We win 4 out of 5 deals without being the highest offer.

The highest offer that never closes is worth zero. Deals are won in Steps 1 and 3 — the seller picks the operator who heard them and showed up prepared, not the biggest number on the table.